1)Cryptocurency

2)Forex ( Eur/uds)

Stocks ( individual stake in Apple Amazon, Tesla and so on)

Bitcoin (created in 2009)

Commodities are raw materials used to create products.

3)Sale road map:  
\*Intro → KYC → Offer → Closing

4) Intro – Introducing ourselves & company

Like: hello→ how are you → a’m X from company !KEY PEOPLE. → I’m contacting regarding your request. I was assigned as you personal account manager I’ll be helping you today.

\*KYC: experience, age, country, usa??, vcd(valid documents), citizen(in country 7+ years)

-1st if all do you happen to have previous experience in this field?

No – Ok, it’s not a problem, ill guide you through the whole process step by step.

Yes – could you tell me about this experience, was it positive or not? Were you trading by yourself, or with help of bank/broker?

This is an offer for Canadian citizen only, so I believe you are originally from Canada? -Yes

-Beautiful, so as a proof of your identity do you have a drive license? - And I believe you don’t have documents related to the USA?

-No

Where are you from?

-Indi

-It’s a beautiful country, I would like to visit it someday,

\_\_\_\_

Potencial scenario:

Hello, I am speaking to May? How are you doing today? I’m Nick, I’m from KEY People Company. I’m contacting about your request that you let at investments platform. Believe you are interesting in trading and making money? I was assigned as your personal account manager, and will be helping you today.

If you don’t mind, I’ll ask you a couple of questions to confirm, that you fit our company requirements.

\*We are providing our services only for people whom Canada, so I believe you are from this country?

- Yes, I am.

- Great! Are you living in Canada for all your life, or you came there from another country?

- I am originally from England

- And for how long you stay in Canada?

- About 25 years

- O, it’s quite long period of time, but how old are you? Why did you left the England, probably working trip, or with family?

\*Do you have some experience in this field?

-Yes

- Tell me please about this experience, was it positive or not? Did you traded by yourself or with help of broker?

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- No

-It’s not a problem at all, I’ll guide you through the whole process.

(Banned: Ukraine, Moldova, France, Ukraine, Germany, USA, Israel)

5) Forms of paraverbal

\*Whisper effect

\* Silence technique

\* Tone of voice

\* Active listening

6) Must be avoided:

-making promises under any shape or form

-to use profanity against other clients

- Consent words or phrases(Can I, Can you, Mai I, Sir)

-Sensitive words (Gambling, Fraud, Lose money, Scam)

7) KYC

- Job/income

- Mortgage/ Rent

- Loans/debts

- Goals

- Family

- Savings

8) Leverage and margin

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Financial markets :

1) Cryptomarket

2) FOREX ( Foreign exchange market)

Major pairs (EUR/USD; GBP/USD; USD/JPY; AUD/USD; USD/CAD)

3) Capital markets

4) Commodities

Ways to make money:  
- long-term investments

**-** trading

- arbitrage

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**Contract for difference (cfd)**

- Cdf a contract for difference. Working with cdf trader does not actually own asset to which he is tied.

- CDF can be linked to any type of assets such as stocks, commodities, bonds, crypto and so on.

- No need to own

- Traders can make money working with both bullish and bearish market, with high leverage.

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**NFP**

NFP – non-farm payroll is a measurement of the change in the number of employees, excluding farm, government, private household and non-profit organizations employees in the USA during previous maonth.

**How to make money?**

**-** Rate of employment

If job growth is really strong, it’s a good sign to invest in stock market. If otherwise – to sell.

- Rate of unemployment

If the unemployment rate is low the USD strength is growing. If no – the same like in p1.: strength is weakening.

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Auto trading is offered to clients to. But Financial Experts are better. (Shortly saying)

Expert’s analysis based not only at algorithms, but and at differ, unusual factors , that can affect financial market too.

Does the company provides the software? Yes, it does. But for the first time, until the client has no enough experience, the best way is to work with Financial experts.

- A major fact that affects the financial market are the **news** (also called **fundamental analysis**).

- Another: **patterns** (or **technical analysis)**.

- Trading signals (Trigger signals to buy or sell the assets)

How client can be sure, that he will not lose money – Thanks to Risk management tools (An automated tool that help you buy/sell assets with established price, to prevent lose of money).

+ Diversification strategy

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\* Intro

\* Some questions about the personality (Age, Job/Income, Family, Loans/ Debts, Savings, Mortgage)

\* Specify interests/goals, intends and the main thread for the future conversation and the offer base.

\* Why he needs investments? Money/Family, Curiosity?

\* Creating interesting offer for person.

19.01.2024

**Financial Strategy**

- Commission: From the start it is about 1%, And can grow with time up to 10%;

- Trading signals: Signals to sell or to buy assets. Can be generated by human analysis or generated using mathematical algorithms based of market actions.

- Financial analytics is offered by financial advisers based on fundamental and technical analysis.

- Platform: user friendly platform comes with a variety of highly advanced charting tools and technical indicators.

- Personal Portfolio: is a collection of investments did by customer. It’s fully managed and diversified by company.

- Risk management: A number of risk management measures are being taken. First of all it comes to the financial expert. Doing all the fundamental and technical analysis.

- Financial expert: has more than 10 years of experience if offered to build the best strategy possible for each individual client. Every client has his personal financial expert.

**Road**

**INTRO**

Greeting and some **questions** about the client.

…..

**KYC**

**What can offer company?**

Why I’m asking these questions?

- Personal Financial Strategy (based on client’s goals: mortgage, car, house and so on)

- Risk management (Platform has risk management tools)

- Commission (We are interested in clients profit, because company’s profit is in commission)

- Financial expert (Are active 24/5 and will guide all the time)

- Trading signals (Are maid by algorithms and can be made by the client’s analysis)

- Financial Analytics (Client Always can receive advise from experienced trained)

- Platform (Platform has all the necessary tools for investing and anylysis)

- Personal Portfolio (Portfolio gives a comfortable opportunities to handle your investments)